DOCUMENT RESUME

ED 222 148 HE 015 587

TITLE	Health Manpower Planning. Report on a Workshop (Copenhagen, Denmark, October 26-30, 1982).
INSTITUTION	World Health Organization, Copenhagen (Denmark). Regional Office for Europe.
REPORT NO	ICP/MPM-028
PUB DATE	Oct 82
NOTE	15p.; For related documents see HE 015 586-588.
AVAILABLE FROM	World Health Organization, Regional Office for Europe, Scherfigsvej 8, DK-2100 Copenhagen, Denmark.
EDRS PRICE	MF01 Plus Postage. PC Not Available from EDRS.
DESCRIPTORS	Agency Role; Delivery Systems; Employment Opportunities; Foreign Countries; Guidelines; *Health Personnel; Health Services; Higher Education; Human Resources; *International Organizations; *Labor Supply; Medical Education; Needs Assessment; Nursing Education; *Planning; Problem Solving; *Professional Education; Training Objectives; Workshops
IDENTIFIERS	*Europe; *World Health Organization

ABSTRACT

A report of a 1981 Workshop on Health Manpower Planning, sponsored by the World Health Organization's (WHO) Regional Office for Europe, is presented. The purpose of the workshop was to familiarize participants with the procedural steps of health manpower planning (HMP) and with methods of organizing it in their respective countries. The content covered the following: producing a situation report; projecting health manpower supply and requirements; identifying the problems the projections imply; proposing solutions to the problems, taking into account the organizational and managerial implications; producing strategic and detailed health manpower development plans; and implementation, monitoring, and evaluation of the plans. Workshop participants recommend that: countries should call on WHO to provide assistance in planning the introduction of HMP, in training in HMP, and in implementing and monitoring of HMP; WHO should periodically organize intercountry workshops on current HMP problems; WHO should support national HMP workshops and the formulation of national manpower plans; and WHO should assemble and publish examples of good HMP practice in order to support HMP in other countries. Evaluation of the workshop, its format and content, was also undertaken. The workshop was based on "Guidelines for Health Manpower Planning," by P. Hornby, D. K. Ray, P. J. Shipp, and T. L. Hall and "Health Manpower Planning: Principles, Methods, Issues," edited by T. L. Hall and A. Mejia. Appended materials include a list of workshop participants and a detailed program and timetable. (SW)

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HEALTH MANPOWER PLANNING

ED222148

Report on a Workshop

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WORLD HEALTH ORGANIZATION
Regional Office for Europe
COPENHAGEN

HEALTH MANPOWER PLANNING

Report on a Workshop

Copenhagen
26-30 October 1982

WORLD HEALTH ORGANIZATION
Regional Office for Europe
COPENHAGEN
1982

English only
Unedited
Limited distribution

ICP/MPM 028

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1. Summary

A Workshop on Health Manpower Planning (HMP) was held in the Regional Office for Europe, Copenhagen, on 26-30 October 1981. It was attended by:

- 12 participants from nine European Member States
- 1 representative of the International Council of Nurses
- 3 staff members from the Regional Office for Europe
- 1 staff member from the Regional Office for the Americas/Pan American Sanitary Bureau
- 1 staff member from the Regional Office for the Western Pacific
- 1 staff member from WHO Headquarters, Geneva
- 1 WHO consultant.

A full list of those attending is given in Annex A. The detailed programme and timetable for the week is given in Annex B.

Workshop participants recommended that:

- countries should call on WHO to provide advice, guidance and support for planning the introduction of HMP, training in HMP, implementation of HMP and monitoring/evaluating the results;
- WHO should periodically organize inter-country workshops on current HMP problems and their solution and on different aspects of HMP systems and techniques;
- WHO should support national HMP workshops and the formulation of national manpower plans;
- WHO should assemble and publish examples of good HMP practice in order to support HMP in countries.

2. Background

From the mid-1970's, WHO has given high priority to country health programming (CHP) and many countries have responded by undertaking CHP exercises. A major question which arises naturally at the end of such an exercise is the role of health manpower development (HMD) in CHP. A workshop on this topic was held in April 1977 in Berne. It concluded that a more scientific approach to forecast and plan health manpower was required. WHO commissioned work to assemble information on HMP practice within the Region and a joint educational planning/HMP workshop was held under WHO auspices in May 1978 in Berne. This emphasized the need for co-operation and communication between the two areas of activity.

Subsequently, in the work of the Service for Research, Planning and Human Resources of the Regional Office for Europe, three issues arose: educational planning (workshop held in 1980), HMP (the present workshop) and communication skills (workshop planned for 1982). Countries were offered the opportunity to send participants and the response was so great that the attendance by WHO staff had to be restricted. The workshop was organized with the assistance of Dr D. Ray of WHO, Geneva and Mr P. Shipp (Management Sciences for Health, Boston, USA) as WHO consultant.

3. Opening address

Dr A. Wojtczak, Director, Research, Planning and Human Resources of the WHO Regional Office for Europe, welcomed participants to the first Workshop on Health Manpower Planning to be held in the Region. He emphasized that the topic of health manpower planning was becoming of first importance for all countries within the Region. There was already a widespread recognition in each country of the need to plan the effective use of all resources employed in the delivery of health care to its population and, in every case, the human resources accounted for the largest single item in the health budget. In addition, the economic circumstances of countries in the Region over the last few years had increased considerably the emphasis on obtaining the maximum benefit from the resources available.

These new circumstances had now highlighted a number of health manpower problems which some countries were already facing and many more would face in the foreseeable future. These problems included oversupply of physicians and overspecialization in their training, shortage of nurses (even to the point where health facilities were being closed), maldistribution of health staff and hence health services within countries and the improper utilization of staff, particularly arising from a lack of effective teamwork in the delivery of health services.

The time was now ripe for those countries in the Region that had not yet done so, to undertake national and local manpower planning exercises, in order to co-ordinate more closely the manpower resources with the overall health plans and to improve the effectiveness of the health services delivered to the population. Dr Wojtczak hoped that the workshop would provide the basis for undertaking such exercises and he wished participants every success in their week's work.

4. The workshop

4.1 Scope and purpose

Health care delivery depends primarily on the availability and deployment of trained health manpower. However, the problems encountered in training and deploying such manpower vary considerably in different parts of the world. While in most countries, there is a shortage of almost all types of trained health manpower, the training and planning situation in European countries has its own special problems. Some of the issues in health manpower development,which have recently been giving rise to concern in the European Region, are as follows:

1. Have some countries reached a stage in which they are training manpower in excess of their absorptive capacities? Will there be a surplus or a shortage of trained health manpower by the turn of the century?

2. Is there excessive specialization by doctors and nurses in some countries? Is that specialization appropriate to the needs and demands of the population and does it adversely affect the availability of general practitioners?

3. Should entry to medical or nursing schools depend solely on academic excellence, or should admission requirements be changed to reflect applicants' attitudes and sense of social responsibility?

4. Are the needs of health care changing and is there a need to re-examine the tasks to be performed by trained health manpower, in particular by doctors and nurses?

5. What are the chief problems connected with the living and working conditions of health manpower? How could they be tackled in such a way as to achieve better distribution of manpower and to improve the deployment of those who have been trained but are no longer part of the active labour force, e.g. married women?

6. Are career development schemes and systems of continuing education interlinked? If so, to what extent? Should any new directions be taken in this respect?

The purpose of the workshop was to familiarize participants with the procedural steps of health manpower planning and with methods of organizing it on their return to their respective countries. The aim was that, at the end of the workshop, participants would be able to organize health manpower planning activities in their own countries and undertake the formulation of health manpower plans. The emphasis was on the processes and techniques of manpower planning. The workshop did not provide ready-made solutions although it did indicate possible solutions resulting from the exchange of information and experiences among the participants themselves.

4.2 Content

The workshop was based on "Guidelines for Health Manpower Planning" by P. Hornby, D.K. Ray, P.J. Shipp and T.L. Hall (WHO, 1980) and "Health Manpower Planning: Principles, Methods, Issues", edited by T.L. Hall and A. Mejia (WHO,1978). It followed closely the material of the "Guidelines" and covered:

- preparing for a health manpower planning exercise;
- producing a situation report;
- projecting health manpower supply and requirements;
- identifying the problems these projections imply;
- proposing solutions to these problems, taking into account the organizational and managerial implications;
- producing strategic and detailed health manpower development plans;
- implementation, monitoring and evaluation of the plans.

4.3 Method of working

The whole approach of the workshop was based on the active participation of those attending. The aim was for participants to learn by doing, including solving problems by group work during practial exercises which simulated closely the actual process. A major part of each session was devoted to these practical exercises.

The success of the workshop depended mainly on the effort put in by participants, not only in their working groups but also in absorbing the material in the "Guidelines". There was no lecturing during the workshop. Each half-day session started with the Moderator giving a statement of its educational objectives, a brief review of the "Guidelines" material to be covered and answers to any questions of clarification. The exercises to be undertaken by the working groups were introduced by the Moderator and explained in detail. The plenary session was then adjourned for participants to form three working groups.

The majority of the time was spent by participants in their working groups and each group produced a written result or solution to the exercises set. The outcome of this work was presented to the reconvened plenary by a representative of each group. This allowed participants to compare, comment on, question and learn from the work of other groups and also emphasized the importance of effective presentation of complex information and ideas in manpower planning work. Each session finished with the Moderator of the session summarizing the main conclusions of the presentations, restating the educational objectives of the session and relating them to the results presented.

To increase the interchange of detailed information and experience between countries, the three working groups were reconstituted after two days of the workshop. From that time, each working group undertook the exercises with reference to a particular category of health manpower. The three new groups selected the categories: all physicians, general practitioners and nurses. The exercises in the remaining sessions were designed to work through the successive stages of the manpower planning process so that the results produced by a working group in one session provided the starting point for its work in the following session.

In addition, to provide experience of running this workshop to those who might wish to undertake such an exercise in their own countries, five participants acted as Moderators for one session each during the workshop.

4.4 Adaptation of the "Guidelines" material

The exercises in the "Guidelines" have been designed for use in national workshops in which the health manpower problems of a single country are addressed by those with some responsibility for solving those problems using the actual data available in the country. The results or solutions produced by the working groups can then provide the first draft of a health manpower plan. In this workshop the participants came from many countries and it was inappropriate to concentrate on the particular conditions in any one of them.

To allow for the international constitution of the working groups, a new set of exercises was produced for each session's material in the "Guidelines". These new exercises were designed so that wherever possible, their results would be capable of practical application in any country in the Region wishing to undertake a manpower planning exercise.

In addition, a worked example in the "Guidelines" material shows the calculation of requirements for malaria field workers. This is inappropriate to European conditions and another was circulated to participants showing how to calculate the manpower requirements of an antenatal monitoring service.

Finally, the material and exercises of sessions 7/8 and sessions 9/10 of the "Guidelines" were combined into two sessions (see Programme - Annex B) to compress the twelve segments of material in the "Guidelines" into the ten half-day sessions available to the workshop.

5. Conclusions and recommendations

In the final session of the workshop, the participants put forward a number of conclusions and recommendations based on their experience during the workshop, as follows:

A. For the health authorities in individual countries

1. It is most desirable to undertake HMP at national, regional and local levels.

2. To accomplish this, it is necessary to mount educational activities in HMP, both for health policy-makers and for HMP technicians, perhaps based on the "Guidelines" used in this workshop.

3. Countries should call on WHO to provide advice, guidance and support for:

   - planning for the introduction of an HMP system and capability to operate it;
   - undertaking the necessary training of health policy makers, administrators and technicians;
   - implementing an HMP system;
   - monitoring and evaluating the results.

4. Countries should support WHO in the organization of inter-country workshops on:

   - the health manpower problems currently facing countries in the Region;
   - the design and use of HMP systems and techniques;
   - monitoring and evaluating the use of HMP systems and techniques;
   - experiences in tackling and solving health manpower problems.

B. For WHO

1. The continued and public support of HMP by WHO is the most important task in stimulating HMP activities at country level.

2. WHO should support national workshops on several aspects of HMP (see (A) 3. above). These would benefit the country concerned and provide useful information and experiences for other countries.

3. WHO should mount inter-country workshops on several aspects of HMP (see (A) 4. above).

4. WHO should provide short-term consultants to help in national workshops and subsequently provide technical support in the start-up of HMP systems.

5. WHO should seek out and publish examples of good HMP practice relevant to countries in the Region. It should circulate relevant papers currently available.

There was also a set of more detailed conclusions and recommendations relating specifically to the content and conduct of the workshop, as follows:

- more emphasis and opportunity could be given to the exchange of country experiences of particular problems;

- a companion workshop on implementation and evaluation would be useful.

6. Evaluation of the workshop

A. Course evaluation

The "Guidelines" include two course evaluation instruments, a pre-course and an end-of-course questionnaire. The first is designed to obtain data on the age, training and experience of participants and information on their knowledge and views of manpower planning. The second repeats some questions from the first to establish the extent to which knowledge and views of manpower planning have changed during the workshop and also invites views on the course itself. In the present workshop, virtually no pre-course questionnaires were completed and handed in, although every participant present on the last day of the workshop handed in a completed end-of-course questionnaire. Thus, from the viewpoint of course evaluation, "measured" changes in knowledge and views of manpower planning cannot be quoted. The useful items remaining are participants' views on the course itself.

Evaluations were invited on the format and content of sessions and the responses were as follows:

- introductory presentations were easy to understand, and the examples used were clear and relevant;

- work exercises were seen to be relevant and about the right level of difficulty but on the whole were too long for the time allowed;

- plenary discussions were extremely interesting and useful although the time allocated was perhaps a little too short.

It may be remarked that the explicit aim of the work exercises is to come as close to actual working conditions as the workshop situation allows. The fact that working groups nearly always report they had insufficient time to do all that they would have wished on all the exercises set them is neither accidental nor unexpected. However, it is important that they should complete a substantial proportion of exercise material, both for learning and the motivation effect of a sense of achievement.

Participants' views were also invited on several aspects of the course as a whole and the responses were as follows:

- it was useful to dispatch reading material in advance;

- the number of participants (initially 18, excluding organizers) was about right;

- the amount of work required of participants was reasonable;

- participants found the material interesting and felt their knowledge had increased significantly;

- the physical arrangements provided by the Regional Office for Europe were good.

Participants were also invited to suggest changes to the workshop content and process. Undoubtedly, most emphasis was put on increasing the amount of information available about the current situation and problems in individual countries and several means were suggested - setting aside time for country presentations by individual participants, basing exercises on specific countries, reducing the amount of time devoted to exercises in favour of plenary discussion of individual country experiences and increasing the number of country examples used in sessional presentations. These views are undoubtedly reflected in the recommendation from the participants that further inter-country workshops on several aspects of HMP should be held (see section 5. Conclusions and recommendations, (A) 4. and (B) 3.). Although many of the suggestions made are valuable and should be incorporated in future inter-country workshops

based on the "Guidelines", it should be remembered that the "Guidelines" material has the stated objective "..... to facilitate the training of health service managers, planners and educators who can apply the principles and methods of health manpower planning." While knowledge of what is happening in other countries is undoubtedly valuable, it is perhaps best to make it the primary focus of a separate workshop or group of sessions within a "Guidelines" workshop, rather than try to restructure "Guidelines" sessions to incorporate a second major objective. A second suggestion which commanded wide support was that a moderator should be a member of each working group. Undoubtedly, such an individual can be used as a resource on statistical or technical matters in national workshops where current problems are being tackled directly. However, in this inter-country workshop, where only one session contained exercises using statistical material, it seemed possible that exercise discussions in a working group might tend to depend too heavily on the moderator's contributions. In view of this, each moderator was not allocated to a specific group but visited all of them in rotation. The moderators found this approach successful in avoiding the frequent implied invitation to do a group's work on its behalf and would recommend this approach in future inter-country workshops.

8. Sessional evaluations

Experience in previous workshops based on the "Guidelines" had shown that inviting participants to complete evaluation forms after each session soon became counter-productive. It was, therefore, decided to ask for evaluations after session 3 and 7 only. The evaluation of session 3 (Health Manpower Situation Report) indicated:

a. while on the whole, the stated educational objectives of the session were achieved, there was a difference in the responses; on one objective there had been close agreement among the participants while in another, there had been wide disagreement;

b. the learning material had been very easy to understand but rather less easy to apply in the exercises;

c. the exercises were successful in being easy to understand, interesting and relevant to national issues;

d. while many participants found the time allocations within the session satisfactory, the remainder felt there was too little time for what they wished to absorb, say and do.

The evaluation of Session 7 (Solving Mismatches between Requirements and Supply) indicated:

a. on the whole, there was good agreement among participants that the educational objectives had been achieved;

b. the learning material had been easy to understand, interesting and useful in doing the exercises;

c. the exercises were successful in being easy to understand, interesting and relevant to national issues;

d. nearly all participants were satisfied with the time allocated for initial presentation of the learning material and the final plenary discussions but many still felt under pressure doing the exercises in working groups.

9. The next step

Participants described a number of follow-up activities they themselves intended to undertake, including:

- immediate use of the techniques in their own current work;
- initiating HMP training for staff within their own organizations;
- using the HMP framework of the workshop to bring coherence to a number of fragmented HMP activities within health ministries;
- proposing HMP work to other national organizations employing health manpower and to international professional organizations.

ANNEX I

PROGRAMME

Monday, 26 October 1981	
09.00 - 12.30	Opening of workshop
13.30 - 16.30	Ten Steps to Health Manpower Planning (Session 2 of the Guidelines)
Tuesday, 27 October 1981	
09.30 - 12.30	Health Manpower Situation Report (Session 3 of the Guidelines)
13.30 - 16.30	Future Supply of Manpower (Session 4 of the Guidelines)
Wednesday, 28 October 1981	
09.30 - 12.30	Manpower Requirements (Session 5 of the Guidelines)
13.30 - 16.30	Mismatches between Supply and Requirements (Session 6 of the Guidelines)
Thursday, 29 October 1981	
09.30 - 12.30	Solving Mismatches and Organizational Problems (Sessions 7 and 8 of the Guidelines)
13.30 - 16.30	Manpower Strategy and Health Manpower Development Plan (Sessions 9 and 10 of the Guidelines)
Friday, 30 October 1981	
08.30 - 11.30	Implementation and Monitoring (Session 11 of the Guidelines)
12.30 - 15.00	Concluding session and workshop evaluation (Session 12 of the Guidelines)

ANNEX II

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